



# PRE-SUBMITTAL MEETING

City of Phoenix

Office of Sustainability

Energy Savings Performance Contracting Services

PROJECT 2600000003

PROCUREPHX PRODUCT CATEGORY CODE: 925000000 and  
912000000

RFx Number: 6000001646

August 8, 2024

# WELCOME AND INTRODUCTIONS

- Kandi Kawolsky, Procurement Manger, Design and Construction Procurement – Office of the City Engineer
- Larry Jue, Finance Procurement Officer – Finance Department Procurement
- Mark Hartman, Chief Sustainability Officer – Office of Sustainability
- Carlos Aguilar Hernandez, Energy Management Superintendent – Office of Sustainability

# AGENDA

Meeting Overview

Project Description / Background

Scope of Work / Services

RFP Overview / RFP Evaluation Criteria

Submittal Requirements

Important Dates: Selection Schedule

Websites

ProcurePHX / RFx Electronic Submittal

# MEETING OVERVIEW

Sign-in sheet and PowerPoint will be posted on City of Phoenix's ProcurePHX system (RFx: 6000001646):

<https://eprocurement.phoenix.gov/irj/portal>

(or)

<https://solicitations.phoenix.gov/>

It is your responsibility as a RFP holder to determine, prior to submittal, if any Notifications have been issued.

This is your ONLY opportunity to discuss this solicitation with City staff.

# PROJECT DESCRIPTION/BACKGROUND

- ❖ Renewal of previous 2018 ECSO Qualified Vendor List
- ❖ Will likely select fewer vendors this time around
- ❖ Applies to all City Departments and includes renewable energy
  - ❖ Aviation, Water Services, Convention Center, Public Works, Libraries, Community Centers, Arts and Culture, Housing
- ❖ Goal: Reduce Energy Use 20% by 2030

# SCOPE OF WORK / SERVICES

1. “No Cost High-Level Assessments” for targeted sites
2. Department confirms initial scope and funding source(s)
3. Vendor undertakes Investment-Grade Audit  
30%, 60%, 90% stages – *Certificate of Acceptance*
4. Guaranteed Savings Agreement signed & M&V process defined
5. OPEN BOOK Design & Construction; *Certificate of Acceptance*;  
Post Construction: Annual Review, Reconciliation and Reporting

# PREVIOUS ESCO PROJECTS

- INVESTMENT GRADE AUDITS FOR:
  - ENERGY EFFICIENT LIGHTING UPGRADES
  - ROOFTOP UNIT CONTROL OPTIMIZATION
  - PHOTOVOLTAIC ARRAY EVALUATION
  - AERO SEAL / DUCT SEALING
  - AHU OUTSIDE AIRFLOW CONTROL
  - CHILLER PLANT UPGRADES
  - WTP /WWTP /WTF PLUG LOAD CONTROLLERS
  - WTP /WWTP /WTF BIPOLAR IONIZATION
- SOLAR PARKING STRUCTURES
- BUILDING AUTOMATION SYSTEMS
- MECHANICAL SYSTEM UPGRADES



FOR THE PROJECT MANAGER



# SOQ EVALUATION CRITERIA

SELECTION OF THE ESCO WILL BE BASED ON THE FOLLOWING:

- ❖ Participation and Compliance (Pass/Fail)
- ❖ Overview of Approach to Performance Contracting (5 pts max)
- ❖ Project History (15 pts max)
- ❖ Qualifications (15 pts max)
- ❖ Financial Solvency (15 pts max)
- ❖ Technical Approach (10 pts max)
- ❖ Management Approach (10 pts max)
- ❖ City of Phoenix Specific Approach (15 pts max)
- ❖ Cost and Pricing (15 pts max)

# SUBMITTAL REQUIREMENTS

- Submit a complete response to the items in Exhibit B – ESCO Response Template.
- Submit one signed copy of Exhibit D – Cost and Pricing Overview #10 – Sample Pricing Sheet.

## Grounds for disqualification:

- Failure to submit to [kandi.kawolsky@phoenix.gov](mailto:kandi.kawolsky@phoenix.gov) by the due date and time
- Violating “Contact with City Employees” policy

# SELECTION PROCESS

Each response will be evaluated according to the evaluation criteria in the RFP.

Up to two firms will be selected

A contract will be executed upon completion of negotiations of contract terms and City Council approval.

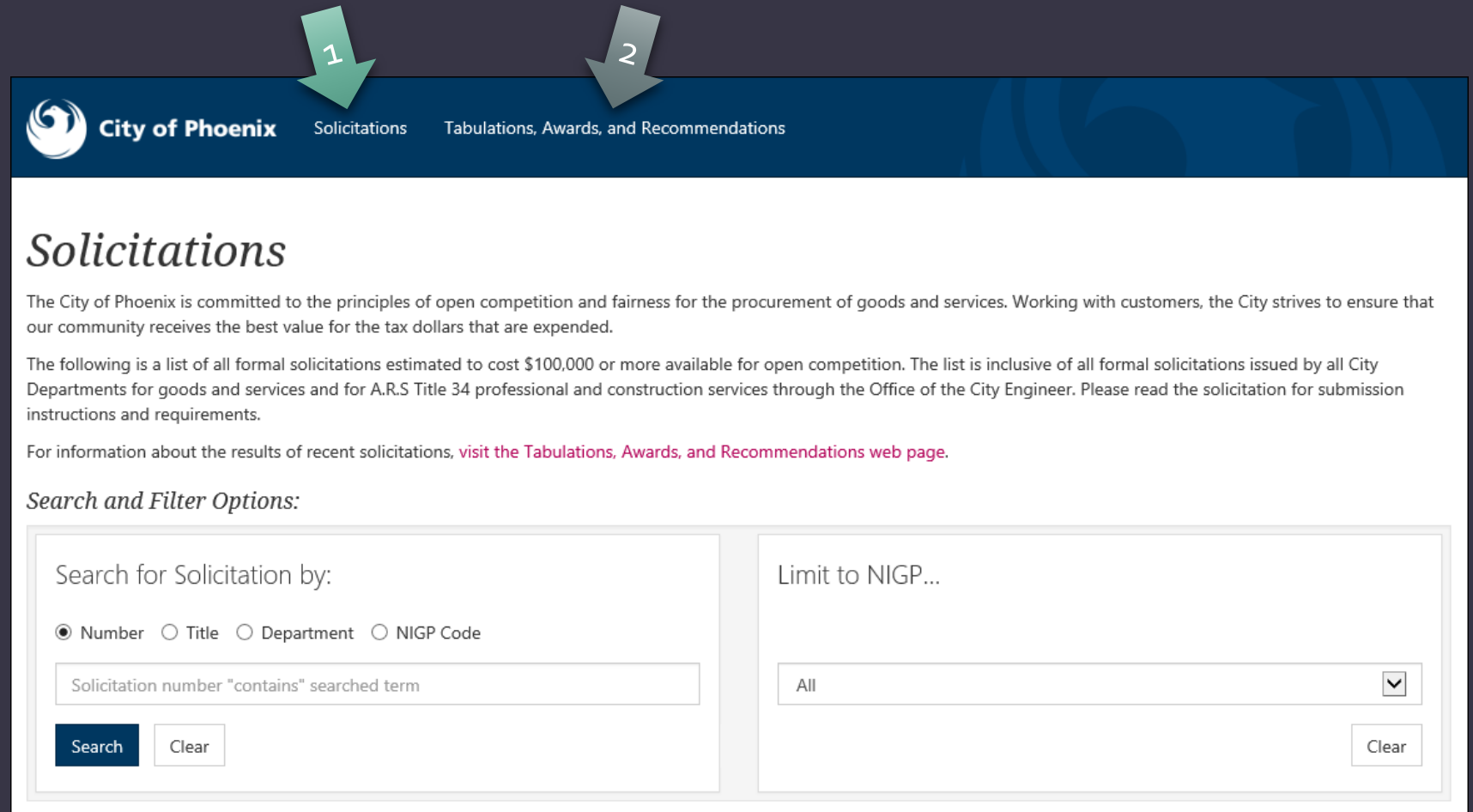
# IMPORTANT DATES: SELECTION SCHEDULE

<b>Event:</b>	<b>Date:</b>
<b>Pre-submittal meeting</b>	<b>August 8, 2024</b>
<b>Written Inquiries Due to Procurement</b>	<b>August 14, 2024</b>
<b>Responses to Inquiries Posted</b>	<b>August 19, 2024</b>
<b>Solicitations Deadline</b>	<b>August 23, 2024</b>
<b>Selection Notification</b>	<b>September 13, 2024</b>
<b>Execution of Base Contract</b>	<b>November 2024</b>

# CITY OF PHOENIX SOLICITATIONS WEBSITE

1. Project-specific RFP, Notifications, Sign-in Sheets, PowerPoint Presentations
2. Link to “Tabulations, Awards and Recommendations” web page

<https://solicitations.phoenix.gov>



The screenshot shows the City of Phoenix website header with the City of Phoenix logo and navigation links for "Solicitations" and "Tabulations, Awards, and Recommendations". Two arrows, labeled "1" and "2", point to these links respectively. Below the header is the "Solicitations" page content, including a mission statement, a list of formal solicitations, and search/filter options.

**City of Phoenix** Solicitations Tabulations, Awards, and Recommendations

## Solicitations

The City of Phoenix is committed to the principles of open competition and fairness for the procurement of goods and services. Working with customers, the City strives to ensure that our community receives the best value for the tax dollars that are expended.

The following is a list of all formal solicitations estimated to cost \$100,000 or more available for open competition. The list is inclusive of all formal solicitations issued by all City Departments for goods and services and for A.R.S Title 34 professional and construction services through the Office of the City Engineer. Please read the solicitation for submission instructions and requirements.

For information about the results of recent solicitations, [visit the Tabulations, Awards, and Recommendations web page](#).

*Search and Filter Options:*

Search for Solicitation by:

Number  Title  Department  NIGP Code

Solicitation number "contains" searched term

Search Clear

Limit to NIGP...

All

Clear

# REGISTRATION

All Firms **MUST** be registered in the Vendor Management System **PRIOR TO** submitting a Proposal

New Firms – After registering, the City will send an e-mail with a vendor **number** in approximately two days

Information on how to register with the City is available at:


<https://www.phoenix.gov/finance/vendorsreg>

## REGISTRATION HELP




Call Help Desk  
**(602) 262-1819**

Email Help Desk  
[vendor.support@phoenix.gov](mailto:vendor.support@phoenix.gov)



Have you signed up?

### BECOME A VENDOR



1. **Gather** Your Business Info
2. **Scan** Your Signed W-9
3. **Register** in System *Steps to Success!*
4. **Set-Up** ID & Password

To do business with the city you must register in **procurePHX**. To register, you must have a signed, scanned copy of your W-9. **Need Help?** Email [vendor.support@phoenix.gov](mailto:vendor.support@phoenix.gov) or call (602) 262-1819.

- Instructions >
- Registration >
- ProcurePHX Login >

# LOGIN TO PROCUREPHX

A screenshot of the ProcurePHX login page. The page features the ProcurePHX logo in the top left corner, which consists of a pink shopping bag icon with a white smiley face and the text "procurePHX" in a pink and grey font. Below the logo, there are two input fields: "User" and "Password", both with red asterisks indicating they are required. To the right of the "Password" field is a "Log On" button. Below the input fields, there is a link that says "Logon Problems? [Get Support](#)".

 procurePHX

User \*

Password \*

Logon Problems? [Get Support](#)

If your firm is already registered with the City of Phoenix's ProcurePHX system, visit <https://eprocurement.phoenix.gov/irj/portal> to login and access the electronic solicitation

Product Category Code is:  
**925000000 and 912000000**  
RFx (Event) Number is:  
**6000001646**

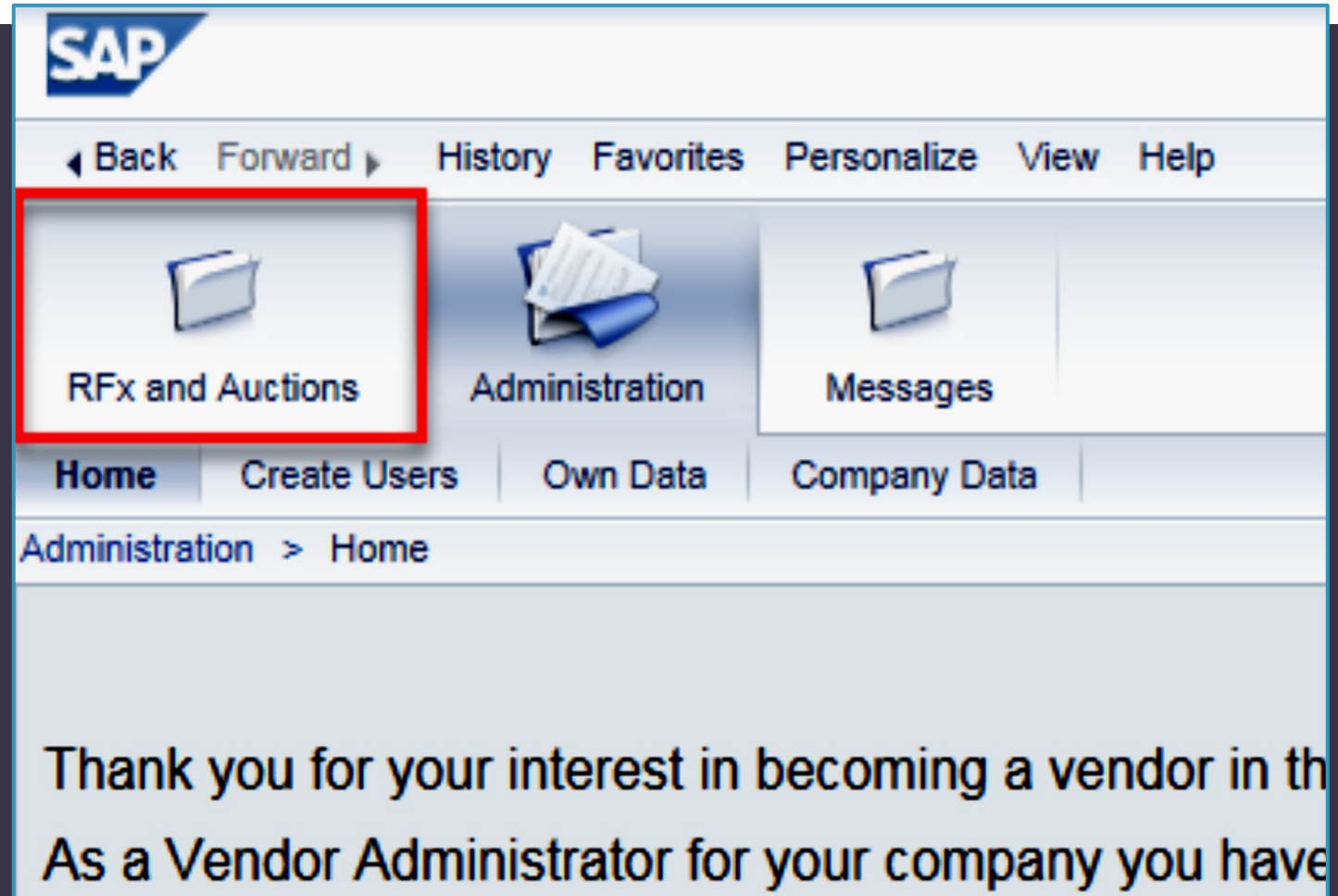
Note: The **VENDOR NUMBER** is to be included on the cover of the Request for Proposals

# RFX HOME SCREEN

Once you are logged in to the ProcurePHX portal:

Select **RFX and Auctions** tab on the top Ribbon

*You will be taken to the RFX Overview (Event) Page*



The screenshot shows the SAP ProcurePHX portal interface. At the top left is the SAP logo. Below it is a navigation bar with links: Back, Forward, History, Favorites, Personalize, View, and Help. The main ribbon contains three primary tabs: 'RFX and Auctions' (highlighted with a red box), 'Administration', and 'Messages'. Below these are four sub-tabs: 'Home', 'Create Users', 'Own Data', and 'Company Data'. The breadcrumb trail shows 'Administration > Home'. The main content area displays a welcome message: 'Thank you for your interest in becoming a vendor in the... As a Vendor Administrator for your company you have...'



# FINDING SOLICITATIONS

RFx and Auctions Administration Messages

Overview

RFx and Auctions > Overview > RFx and Auctions

**Active Queries**

eRFxs **All (7)** [Published \(1\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eAuctions [All \(0\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

**eRFxs - All**

Show Quick Criteria Maintenance

View: [Standard View] | Create Response | Display Event | Display Response | Print Preview | **Refresh** | Ex

Event Number	Event Description	Event Type	Event Sta
<a href="#">6000000583</a>	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published

- Click the Refresh Button on the RFx Overview (Event) Page to see the most current information.
- Find the solicitation you'd like to view from the list, by RFx (Event) Number.
- For this solicitation, your RFx (Event) Number is: 6000001646

# VIEW SELECTED SOLICITATION

1. Click the gray box next to the RFX (Event) Number you'd like to view.

2. Click **Display Event**

This will open a new window to view the selected RFX

*\*If you don't see the new window, check your **POP-UP BLOCKER**.\**

RFX and Auctions Administration Messages

Overview

RFX and Auctions > Overview > RFX and Auctions

**Active Queries**

eRFxs **All (7)** [Published \(1\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eAuctions [All \(0\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

**eRFxs - All**

► Show Quick Criteria Maintenance

View: [Standard View] | Create Response **Display Event** Display Re

Event Number	Event Description
6000000583	PHX-19-R-ZCIP-63-000004-001
6000000578	PHX-19-R-ZCIP-84-000001

# WOULD YOU LIKE UPDATES ON THIS SOLICITATION?

**Display RFX :**

Print Preview | Refresh | Close | **Participate** | Do Not Participate | Tentative | Create Response

Rfx Number 6000000583    Smart Number PHX-19-R-ZCIP-63-000004-001    RFX Status  
Rfx Version Type Active Version

**RFX Information** | Items | Notes and Attachments

Rfx Parameters | Questions | Notes and Attachments | Table Extensions

Time Zone: MSTNO

\* Start Date: 07/11/2018 13:30:00

\* Submission Deadline: 07/11/2018 14:00:00

Opening Date: 07/11/2018 14:00:00

Currency: USD

\* Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR Y

Update your **Participation Status** accordingly

1. Click **Participate**. *This will ensure you to get email notifications regarding your RFX Event, i.e. Notifications, New Attachments.*
2. Review **RFX Information** Tab for Start/Due dates/ Title of Solicitation

# DO YOU WANT TO SUBMIT FOR THIS SOLICITATION?

1. Click **Create Response**
2. Review **Notes and Attachments** Tab for the RFP, Pre-Submittal Presentation, Attendance Sheet, and Notifications, etc.

**Display RFX :**

Print Preview | Refresh | Close | Do Not Participate | Tentative | **Create Response** | Questions and Answers ( )

You have been registered. You will be informed of RFX changes

RFX Number 6000000583    Smart Number PHX-19-R-ZC 000004-001    RFX Status Published  
RFX Version Type Active Version

**RFX Information** | Items | Notes and Attachments

RFX Parameters | Questions | Notes and Attachments | Table Extensions

Time Zone: MSTNO

\* Start Date: 07/11/2018 13:30:00

\* Submission Deadline: 07/11/2018 14:00:00

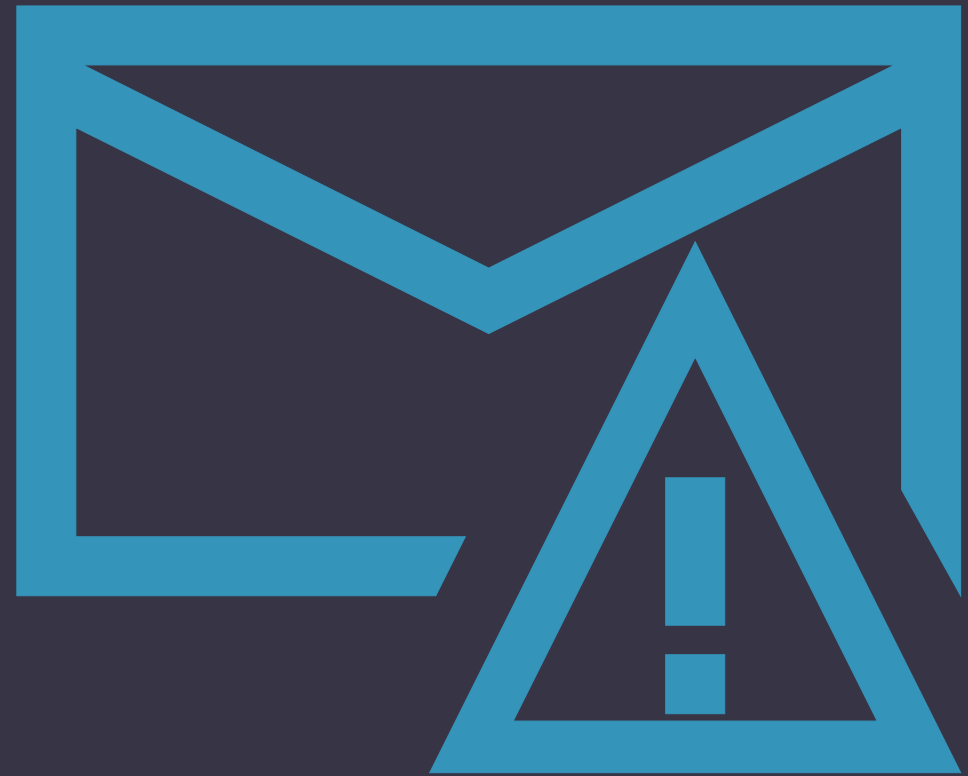
Opening Date: 07/11/2018 14:00:00

Currency: USD

\* Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR YEARS 2019 -

# TIPS & TRICKS

- Click **“Refresh”** often
- Make sure your Pop-Up blocker is turned **off**
- Application is accessible with Internet Explorer or Google Chrome
- When finished, always click **“Close”** on current screen, then click **“Log Out”** on upper right corner, following you can click the **“X”** in the upper right corner of the internet application.



# QUESTIONS AFTER TODAY?

Email all questions to:  
[kandi.kawolsky@phoenix.gov](mailto:kandi.kawolsky@phoenix.gov)  
Or call: 602-256-4108

Reference RFX 6000001646 in  
your email subject line



**Thank You for Attending!!!**